

Generate Service Contract (O4) from Purchase Requisition (O3) or Deviation Request (O8)

Overview

Once a Purchase Requisition is created, or a Deviation Request is created and approved by AS Materiel, a Service Contract can be generated. All bids must be documented as a Header attachment on the Requisition (O3) or Deviation Request (O8) document. (Please reference the [Entering Attachment to Order Header](#) work instructions.)

NIS Policies

The tasks in this documentation provide end users with the tools to enter data and collect data in NIS. It is the responsibility of the agencies to comply with State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer to both internal agency resources and the Administrative Services website: <http://www.das.state.ne.us/>.

Navigation

Click Roles, Procurement or Inventory.
(Citrix users – right click on the menu, choose View by Role, choose Procurement.)

Order Type	Description	Navigation
O3 → O4	Generate Service Contract from Service Requisition	Purchasing – Agencies > Contracts - Agency > Gen Service Contract (O4) from Agency Req (O3)
O8 → O4	Generate Service Contract from Deviation Request	Purchasing - Agencies > Deviation Request > Gen Service Contract (O4) from Dev Request (O8)

Steps

 The following steps/screenshots show an example of Generating a Service Contract (O4) from Service Requisition (O3). The steps are the same for Generating a Service Contract (O4) from Deviation Request (O8).

Start this instruction from the Work with Order Release window.

1. Enter the **order number** in the Order Number field, if known, to minimize the search.
2. Click **Find**.

3. Choose the row(s) in the grid that reflect the detail lines from the purchase requisition previously entered.
4. Click **Row, Order Release**. The Order Release window appears.

5. Verify the following fields in the header:
 - **Branch/Plant** – A valid Business Unit for your agency

- **Supplier** – review this value and determine correct supplier number
- **Buyer** – you can populate with the address book record for the individual in your agency who will be responsible for the contract
- **Ship To** – reflects a delivery location for your agency

 The Send Invoice To field cannot be changed when generating a Service Contract from a Requisition. If the Send Invoice field needs to be changed, the agency will need to revise the document. Please follow the work instructions for [Revising a Purchasing Document](#) and change the Send Invoice To field on the Order Header and Order Detail screens.

6. Review the following fields on the **Release Information** tab:

- **Release Qty** – Quantity from the Requisition will populate – change this quantity only if it is determined a need to increase or decrease the field.
- **Release Amt** – Allow to automatically calculate



The screenshot shows the 'Release Information' tab of the 'Gen Comm PO (OG) from Contract (OC) - Order Release' screen. The 'Supplier' field is populated with '500233' and 'MIDWEST SERVICE & SALES COMPAN'. The 'Buyer' field is '1117504' and 'MILLER, LINDSEY'. The 'Ship To' field is '250227' and 'ROADS LINCOLN CENTRAL COMPLEX'. The 'Branch/Plant' is '27227150'. The 'Order Number' is '11096'. The 'Inventory Number' is '76008' and the description is 'plow blade 1/2" x 6" x 6"'. The 'Account Number' is '9000.554900'. There are radio buttons for 'Release', 'Close', and 'Cancel'.

5. Review the following field on the **Detail Information** tab:

- **Account Number** - must be a valid Account Number for your agency

6. Click the **Dates** tab.



The screenshot shows the 'Dates' tab of the 'Gen Comm PO (OG) from Contract (OC) - Order Release' screen. The 'Requested' date is '03/02/2006'. The 'Promised Delivery' date is '03/02/2006'. The 'G/L Date' is '03/02/2006'. The 'Cancel Date' is empty. The 'Order Date' is '09/14/2004'. The 'Planned Effective' date is '09/14/2004'.

7. Review the following information on the **Dates** tab:

- **Requested** – date to receive order

- **Promised Delivery** – date the vendor can meet

 If multiple rows were chosen, the Order Release window refreshes with the next item. Repeat Steps 5 - 9 for each Inventory Number that you wish to include on the Service Contract.

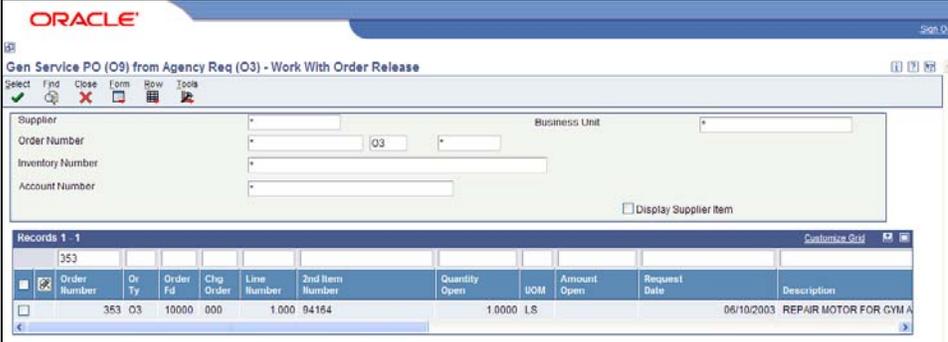
8. Click **OK** to return to the Work with Order Release window
9. Click **Form, Generate Order** to generate the orders. The Generated Purchase Orders window appears.



Order Number	Or Ty	Order Co	Branch/ Plant	Supplier	Request Date
11671	O4	56513	65050011	502372	03/03/2006

 The new Order Number and Or Ty (Order Type) will appear and should be noted if you wish to do more work with them or facilitate searches later.

10. The newly generated contract may need to be revised to update the Send Invoice field or UOM (Unit of Measure fields). To make these revisions click **Row, Open Order Inquiry**. The Work with Order Details window appears.



Order Number	Or Ty	Order Id	Chg Order	Line Number	2nd Item Number	Quantity Open	UOM	Amount Open	Request Date	Description
353	O3	10000	000	1.000	94154	1.0000	LS		06/10/2003	REPAIR MOTOR FOR GYM A

11. Choose the document and click **Row, Header Revision**. The Order Header window appears.

ORACLE

Revise Service Contract (O4) - Order Header

Order Number: 501 | 04 | 43120 | Business Unit: 31240097

Address Numbers		Dates	
Supplier	500134 MCQUAY.SVC	Order Date	04/03/2003
Ship to	795172 MILITARY DEPT ADJUTANT GENERAL	Requested	04/03/2003
Buyer		Promised Delivery	04/03/2003
Send Invoice To	794671 MILITARY DEPT ADJUTANT GENERAL	Cancel Date	
Pmt Remark:			
Description			
Print Message			
Tax Expt Code		Hold Code	BLANK - HOLD CODES 42/HC
Tax Rate/Area		Approval Code	117418
Certificate		Retainage %	
Tax ID	410404230	Ordered By	MNELSON002
Person/Corp. ID		Order Taken By	
Payment Terms		AIA Document	

Messages

12. Update the following fields:

- **Send Invoice To** - delete the information from this field and press the tab key. The correct Send Invoice To address book number will default. This can be overridden with another address book number if needed.
- **Cancel Date** - view/update cancel date to reflect the end date of the contract.

13. Click **Form, Header to Detail, Populate**.

14. Click **OK**. The Order Detail window appears.

15. Verify Header changes populated to detail lines and revised as needed.

16. Add additional lines pending the agency's rules and regulations.

17. Click **OK** to return to the Work with Order Details window.

18. Click **Close** to return to the Generated Purchase Orders window.

19. Click **Close** to return to the Work with Order Release window.

20. Click **Close** to return to the menu.

 Service and Commodity contracts **must** have a valid end (cancel) date.